

5 Workflows Every Professional Services Firm Should Automate First.

The quick-win automation playbook for law firms, accountancies, HR consultancies and financial services firms of 20–500 staff.

15+

hours saved per person per week

14

days from audit to live automation

£35k

average year-1 saving per client

Free download — no login required

Each workflow includes: what to automate, which tools to use, time to implement, and what you recover in hours and cost.

Why this guide exists.

Most professional services firms lose between 12 and 20 hours per person per week to manual work that should run automatically. The frustrating part is that none of it is complicated to fix — it's just never been prioritised.

This guide covers the five operational workflows that consistently deliver the fastest return on automation investment for UK law firms, accountancies, HR consultancies, and financial services firms of 20–500 staff.

Each workflow is presented with four things you need to know: what to automate, which tools are typically used, how long it takes to implement, and what you recover in hours and cost once it's live.

You don't need a technical background to follow this. These are operational workflows, not engineering projects. The goal is to give you a clear picture of where the hours are going and what it would take to get them back.

HOW TO USE THIS GUIDE

Each of the five workflows is presented on its own spread.

Start with Workflow 1 — it is almost always the fastest win regardless of firm type.

Use the 'Time to recover' figure to build a business case for your leadership team.

If you want a calculation specific to your firm's size and hourly rate, the free audit at opscopilot.io will produce that number for you in 20 minutes.



Client Onboarding

- Law
- Accountancy
- Financial Services
- HR Consulting

WHAT TO AUTOMATE

The average professional services firm runs client onboarding across 6–10 manual touchpoints: welcome email, document request, ID verification, CRM entry, contract issue, signed contract chase, portal setup, and kickoff scheduling.

Every one of these can be automated. A new client triggers a single workflow that handles all subsequent steps — with human review only at the points that genuinely require judgement.

TOOLS TYPICALLY USED

- HubSpot (CRM + sequence trigger)
- Zapier (workflow orchestration)
- DocuSign or Adobe Sign (e-signature)
- Calendly (kickoff scheduling)
- Google Workspace or Outlook (comms)

5–8 days
TIME TO IMPLEMENT

8–12 hrs
HOURS RECOVERED/WEEK

£18k–£28k
TYPICAL YEAR-1 SAVING

WHAT CLIENTS TYPICALLY SAY

"Our client onboarding used to take 3 days and involve 6 people. It now runs automatically in under an hour. The first month after go-live we recovered 40+ hours of team time — roughly £1,400 we're no longer spending on admin."



CRM Updates & Lead Follow-Up

All sectors

WHAT TO AUTOMATE

Sales reps and fee-earners lose 45–60 minutes per day manually updating CRM records after calls, meetings, and emails. At a firm of 20 people, that's over 150 hours per month going into data entry.

Automate CRM updates to trigger on call completion, email reply, or meeting end. Route hot leads to a follow-up sequence automatically. Flag stalled deals to the responsible partner weekly.

TOOLS TYPICALLY USED

- HubSpot (CRM with native automation)
- Zapier or Make.com (cross-tool triggers)
- Aircall or Teams (call completion trigger)
- Gmail / Outlook (email activity sync)

3–5 days
TIME TO IMPLEMENT

5–8 hrs/rep
HOURS RECOVERED/WEEK

£12k–£22k
TYPICAL YEAR-1 SAVING

WHAT CLIENTS TYPICALLY SAY

"We had three partners spending 45 minutes a day on CRM updates. That's gone completely. The system updates itself on call completion and flags anything that needs attention — they just review, they don't enter."



Month-End Reporting

- Accountancy
- Financial Services
- Law

WHAT TO AUTOMATE

Senior staff at professional services firms spend 2 full days per month compiling the same report from the same 3–4 sources. The report is always late. It always contains an error that has to be corrected before distribution.

Automate the data pull from each source, format into the report template, and schedule delivery. The analyst reviews a completed report rather than building it.

TOOLS TYPICALLY USED

- Xero or QuickBooks (financial data source)
- HubSpot (pipeline/CRM data)
- Google Sheets or Excel (report template)
- Zapier + Make.com (data orchestration)
- Slack or email (automated distribution)

7–10 days
TIME TO IMPLEMENT

12–16 hrs
HOURS RECOVERED/WEEK

£22k–£35k
TYPICAL YEAR-1 SAVING

WHAT CLIENTS TYPICALLY SAY

"Our senior analyst was spending 16 hours a week being a human copy machine — pulling numbers from six dashboards and formatting slides for 12 clients. That's completely gone. She does actual analysis now."



New Hire & Internal Onboarding

- HR Consulting
- Law
- Accountancy
- All sectors

WHAT TO AUTOMATE

When a new team member joins, the same sequence of tasks runs every time: IT access request, system provisioning, welcome email sequence, document collection, training schedule creation, buddy assignment, and week-1 check-in.

Every one of these is the same. Every time. Automate the entire sequence from a single trigger: 'New hire added to HR system.'

TOOLS TYPICALLY USED

- BambooHR, Breathe, or HiBob (HR system trigger)
- Zapier (workflow orchestration)
- Slack or Teams (welcome + comms)
- Google Workspace / M365 (provisioning)
- Notion or Confluence (training materials)

5–7 days
TIME TO IMPLEMENT

6–10 hrs
HOURS RECOVERED/WEEK

£10k–£20k
TYPICAL YEAR-1 SAVING

WHAT CLIENTS TYPICALLY SAY

"New hires used to take 3 days to get properly set up — people were chasing IT, waiting for documents, not sure who their buddy was. Now everything is ready before they start. The onboarding experience went from chaos to consistent."

5

Invoice Approval & Payment Chasing

- Accountancy
- Financial Services
- Law
- All sectors

WHAT TO AUTOMATE

Most professional services firms have a finance team member whose job is largely to remind people to approve invoices and chase clients for late payments. This is entirely automatable.

Set approval thresholds. Below £X: auto-approve and send. Above £X: route to the right approver with one-click approval via email. Overdue invoice: trigger escalating reminder sequence at day 7, 14, and 21.

TOOLS TYPICALLY USED

- Xero or QuickBooks (invoice source)
- Zapier (approval routing + chase trigger)
- HubSpot or email (client comms)
- Slack (internal approval notifications)
- Stripe (for online payment link in chase email)

4–6 days
TIME TO IMPLEMENT

4–8 hrs
HOURS RECOVERED/WEEK

£8k–£18k
TYPICAL YEAR-1 SAVING

WHAT CLIENTS TYPICALLY SAY

"We were paying a finance coordinator to spend half her week chasing invoices by email. We automated the entire sequence — the right email goes out on day 7, day 14, and day 21 automatically. Our debtor days dropped by 11 days in the first month."

What would you recover if just one of these ran automatically?

Most firms we work with recover 12–20 hours per person per week from automating the first two workflows on this list alone.

Book your free 20-minute workflow audit.

We'll map your top 3 automation opportunities, ranked by time saved. You'll leave with a specific plan and a cost-recovery calculation for your firm.

- No slides. No pitch. No obligation.
- If automation doesn't make commercial sense, we'll tell you that too.
- Most clients have a specific plan within 48 hours of booking.

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